

OFFICE OF THE CONTROLLER

General Accounting – Travel Team Employee Travel Refresher Training

September 2024





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Travel and Expenses

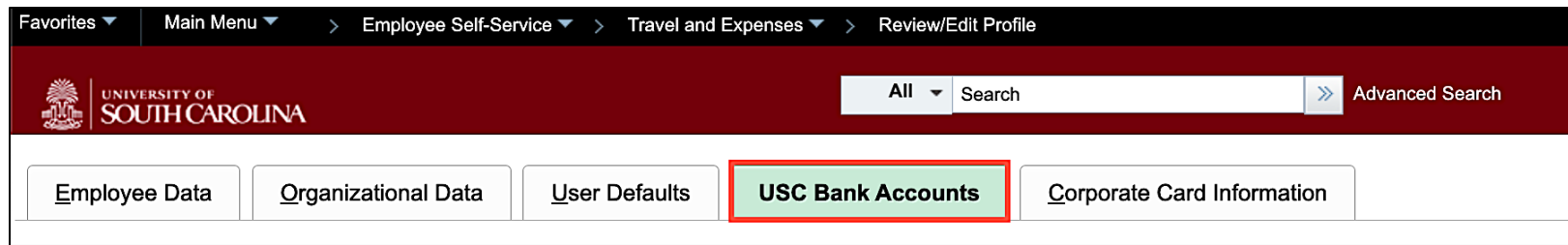


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Employee Travel

Updating bank information - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Review/Edit Profile



- First step to using the Travel and Expense module is entering bank account information.
- Entering banking information validates the traveler, allowing transactions to be completed on their behalf.
- **ALL** payments will be made via direct deposit.

Employee Travel

Travel Authorization (TA) - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Travel Authorization – Create/Modify

- Approved TAs are required for:
 - ✓ Expenses \$5,000 or greater
 - ✓ All Foreign Travel
 - ✓ All Travel Advances
 - ✓ Airline Tickets issued by University Approved Travel Agencies and charged to the TA
- Travel Authorizations must be **Future Dated** using the **business days of travel**.
- Include Destination & Date in Report Description.
- The account code for all employee travel is **55120**
- Once a TA has been associated to an expense report, it is no longer available to use again.
- An Approved TA encumbers the amount on your budget.



Updated Travel Codes

Account Code	New Account Code	Account Code Name	Account Code Description
52021	55105	Non-USC Employee, Consultants, Lecturers, Other	Expense category used only for travel associated with a person providing consultation, guest lecturers or other services for the University.
52022	55110	Student Travel	Expense category used for student travel and student field trips.
52023	55115	Employment Interview Travel	Expense category used only for travel associated with visitation of a potential employee. It should not be used for travel expenses incurred by University personnel in pursuit of prospective employees.
52024	55120	USC Employee Travel	Expense category used for travel for the purpose of conducting business of the university, to include but not limited to, attending professional meetings, special demonstration meetings and other related meetings.
n/a	55125	Travel Registration	*New* Expense category used for non-local registration fees where travel is required.
52028	55130	USC Athletic Department Employee Conferences and Conventions	Expense category used for travel by Athletic Department employees when traveling to donor meetings, coaches meetings, etc.
54541	54541	Participant Travel	Expense category is to be used for participant travel on grant funds if the grant has participant cost budgeted. This should NOT be used for USC students or USC employees.
54542	54541	Student Participant Travel	Expense category is to be used for USC student participant travel on grant funds if the grant has participant cost budgeted.
59421	59421	USC Athletic Department Employee Recruiting	Expense category is to be used for travel by Athletic Department employees when traveling for recruiting purposes.

To enhance clarity and ease of reporting, travel accounts have been moved from 52% to 55%, clearly separating them from "Contractual Services." **This change was effective July 1, 2024.**

Additionally, new account codes for travel have been implemented. This is a matrix referencing the new account code for each type of traveler.



Foreign Employee Travel

International Travel Health Insurance

For faculty and staff on university related international travel, the University strongly recommends that you enroll in specialized international emergency health insurance through USC's policy.

We offer this coverage because most domestic insurance policies do not provide international coverage or consider it out of network. Additionally, domestic policies do not typically provide emergency response assistance in the case of a natural disaster or political unrest, or if you need to be medically evacuated.

You can find the short online enrollment form [here](#).

If you have any questions about the insurance, please reach out to the Global Carolina Office at globalcarolina@sc.edu.



Employee Travel

Travel Advance - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – USC Travel Advances – Create/Modify

- TA is **required** for a Travel Advance.
- A Travel Advance is for up to 70% of total estimated Lodging & Meals up to \$3,000.
- Only 1 advance can be requested & must be applied to an expense report or repaid.
- The Advance is paid 10 days prior to travel.
- The Advance will be applied to the first available expense report.
- The account code for a Travel Advance is 10206.



Employee Travel

Expense Report - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Expense Report – Create/Modify

- Expense Reports must be submitted after the trip. Use the actual business dates of travel.
- For meals, please use three expense lines:
 - ✓ Line 1 - 1st day of travel **include** the **time of departure**.
 - ✓ Line 2 - all days in between.
 - ✓ Line 3 - final day of travel **include** the **time of return**.
- The account code for all employee travel is 55120.
- No reimbursements to an employee prior to travel are allowed.
- All expense reports must be completed and fully approved prior to an employee's termination date.
- Payment Request – Direct payments should include USCID, Name and Destination.



Meal Allowance

Time of Departure	Time of Return	Meal	In-State	Out-of-State
Before 6:30am	After 11:00am	Breakfast	\$8.00	\$10.00
Before 11:00am	After 1:30pm	Lunch	\$10.00	\$15.00
Before 5:15pm	After 8:30pm	Dinner	\$17.00	\$25.00
All Day	All Day	All Meals	\$35.00	\$50.00

- In-State, Out-of-State, & Canada follow the above rates.
- Foreign – US Dept of State guidelines based on country, location, & date.
- **NO MEAL REIMBURSEMENT FOR ONE DAY TRAVEL.**



Demonstration

- How to create a travel authorization?
- How to create an expense report?



Policies & Procedures



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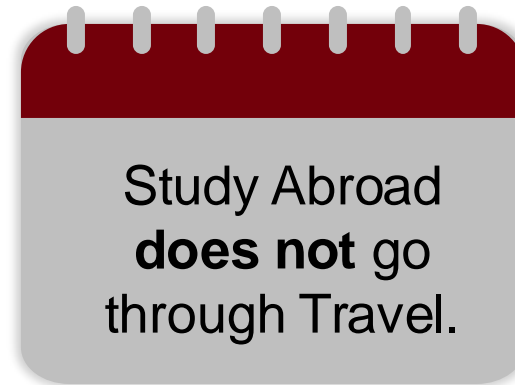
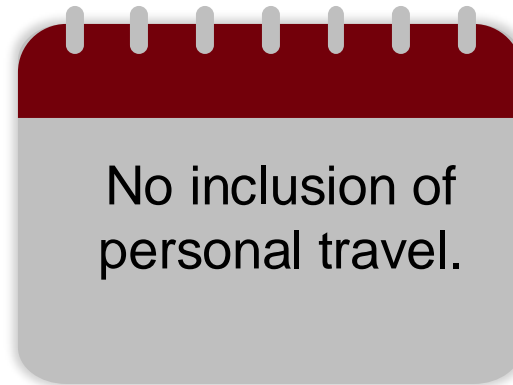
Policies and Procedures

- Airfare – Economy Class only.
- Hotels – Maximum \$429.54/night plus taxes and fees.
- Paid itemized receipts are required for lodging.
- No lodging within 50 miles of your official headquarters and/or place of residence.
- Current mileage rate is \$0.67/mile – No mileage reimbursement within 10 miles of an employee's official headquarters and/or place of residence.
- Ridesharing (Uber, Lyft) is allowed with paid receipt.



Policies and Procedures

- When claiming reimbursement for expenses that are in a foreign currency, expense reports should be completed in US dollars and the rate of exchange documented. Please use the exchange rate on the date of the transaction or amount posted to credit card statement.



- Reimbursement for travel will be made after the trip is complete and expenses should be submitted within 7 days of return from trip.



Resources & Contacts



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Office of the Controller

Office of the Controller

General Accounting

[Accounts Payable](#)[Capital Assets](#)[Chart of Accounts](#)[General Ledger](#)[Moving and Relocation](#)[Travel](#)[Treasury Management](#)[General Accounting Staff Directory](#)Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource and Training
Toolbox

Travel

Travel is responsible for the review and disbursement of funds in accordance with university policies and procedures. Our staff process travel payments and reimbursements for faculty, staff, non-employees and students.

Expense Module Correction Form Expand all Travel Advances Travel Agencies Travel Reimbursement Voucher (TRV) Updating Banking Information 

The employee is responsible for updating banking information in PeopleSoft. This will validate them in the Travel and Expense module and allow them or a Proxy to create an expense transaction on their behalf. Be sure banking information is correct and update when necessary. All Travel and Expense module payments are made via direct deposit.

[Updating Banking Information \[pdf\]](#) Resources 

Contact Travel

For questions about any Travel services, please contact us directly:

1600 Hampton Street, 6th floor
Columbia, SC 29208

Email: teoffice@mailbox.sc.edu 

Where to Find Resources

For Updating Banking
Information Resources, visit our
[Travel](#) Page.





Office of the Controller

Office of the Controller

General Accounting

Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource and Training
Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training
Schedule

Listserves

Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Travel Reimbursement

Travel is responsible for the review and disbursement of funds for faculty, staff, non-employees, and students in accordance with university policies and procedures.

Visit the [Travel](#) page for additional Travel Information.

The below training resources are available:

• Employee Travel

- [Travel and Expense Refresher Recording](#)
- [Travel and Expense Refresher Presentation \[pdf\]](#)
- [Travel and Expense – Traveler Training Recording](#)
- [Travel and Expense – Approver Training Recording](#)
- [Creating a Travel Authorization Recording](#)
- [Creating an Expense Report by Associating a Travel Authorization Recording](#)
- [Creating an Expense Report Recording](#)
- [Approving Expense Transactions – Traveler JobAid \[pdf\]](#)
- [Approving Expense Transactions – Approver JobAid \[pdf\]](#)

Where to Find Resources

For Employee Travel
Reimbursement Resources, visit
our [Business Manager](#) page.



Travel Office Resources

- Contact Us:
teoffice@mailbox.sc.edu
- Controller's Office – Travel Page:
https://www.sc.edu/about/offices_and_divisions/controller/general_accounting/travel/index.php
- Travel Policy:
<http://www.sc.edu/policies/ppm/fina100.pdf>
- Travel Procedures:
https://sc.edu/about/offices_and_divisions/controller/documents/fina100_procedure.pdf



Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
General Email Address	ap@mailbox.sc.edu
AP Uploads	apupload@mailbox.sc.edu
Supplier Maintenance	apsupplr@mailbox.sc.edu
Travel Office	Email Address
General Email Address	teoffice@mailbox.sc.edu
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	tesubmit@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Program Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	travelcard@sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	concpl@mailbox.sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Time and Effort Reporting	timeandeffort@sc.edu

Controller's Office Contact List

Grants and Funds Management	Email Address
Sponsored Award Specific Questions	Contact your Post Award Accountant (PAA)
Payroll	Email Address
General Email Account	payroll@mailbox.sc.edu



Questions



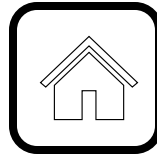
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THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



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Columbia, SC 29208



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